

ESG Impact on Client Investment Portfolios (with case study)

14 Jul 2022 (Thu) | 7:00pm – 10:00pm

HKIB ECF SFC
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3
HOURS



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Objective

ESG is a corporate governance and investment framework at its core. Companies that adopt ESG principles should consider, measure, report, work on, and improve on their business's environmental, social, and governance aspects alongside financial considerations. ESG investors should also consider a company's ESG attributes alongside their financial attributes when making investment decisions.

ESG investing is a growing and rapidly developing priority for investors, asset managers and portfolio companies who are considering the social and environmental impact of their investment activities. Emerging ESG trends and issues affect the way that asset managers think about investment objectives, methodologies, processes, performance, and disclosure. Understanding legal, regulatory, market and business requirements that apply to ESG is crucial for not just legal and compliance professionals but also other business personnel.

For Banks, associating COVID with ESG risks is highly appropriate - Banks should have frameworks for operational resilience that are designed not only to preserve business continuity but also to enable organisations to adjust to changing conditions permanently.

SPEAKER

Key Description

The instructor is a finance industry veteran focusing on sustainable, responsible, and impact investing. She is the Group CEO and founder of a FinTech portal. Her latest venture promotes responsible investing by exposing the stewardship practices of asset managers, insurers, pension providers, and public companies.

She currently serves as an investment governor of a family office in Asia and a Committee member of the Hong Kong Council of Social Services Development Fund.

Programme Outline

In this course we shall identify the significance of applying ESG to client portfolios and it's a practical session on one of the angles in green curriculum:

- Introduction of ESG 101 and why it is vital to client portfolio construction
- Understanding Portfolio ESG impact – negative and positive impacts
- Customising a Portfolio based on client preferences:
 - Values Alignment and avoiding controversies
 - Inclusion of quality investments using 20+ESG KPIs
 - Correlating investment returns and ESG and climate performance
- Client Investments driving towards the Paris-climate scenarios of 1.5°C and 2°C towards 2030 and 2050
- Research, exclude, include, build, test, construct, monitor using ESG as supplementary performance criteria
- Case studies using the practical ESG tool, Companies and portfolio construction



Target Audience

01

Front-line Banking Practitioners

Junior or senior Relationship Managers in banking industry who want to understand how to apply new ESG insights to clients' businesses.

02

Senior Executives

In any industry interested in gaining the ability to address a new ESG business need and looking to remain relevant.

Apply NOW

Scan the QR code at the upper right hand corner or [click here](#) to apply via E-form

Programme Delivery

- Virtual Classroom (Zoom)
- Cantonese

Early Bird DEADLINE

30 Jun 2022 (Thu)

Enquiries

(852) 2153 7800

programme@hkib.org

Application DEADLINE

7 Jul 2022 (Thu)

PRICE LIST

Early Bird

Regular Price

Individual Member
HKD 900

HKD 990

Staff of Corporate Member
HKD 1,080

HKD1,190

Non-Member
HKD 1,200

HKD1,320

Programme Code: HDCPDSUSP220701